Big Purple Dot

Pricing Campaigns

Including Repricing
With Integrated

optimalblue
For sales inquiries please contact sales@bigpurpledot.com

For all other general questions, including training appointments and IT support, please contact support@bigpurpledot.com | (949) 223-0900

Monthly User Fee*
$110

*Setup and other fees may apply. Includes Optimal Blue.

#1 Mortgage CRM Mobile Apps on Both iOS & Android

Key Partner Integrations

- Lead Aggregation
- LOS Integrated
- Agent & Lender Collaboration
- Call Dialer
- SMS & Email Marketing

Encompass by EllieMae

Optimal Blue

Integrated Key Partner Integrations

Agent & Lender Collaboration

Call Dialer

SMS & Email Marketing

#1 Mortgage CRM Mobile Apps on Both iOS & Android

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Methodology

1. Connect  Your leads and opportunities
2. Collaborate  With all key team members
3. Convert  The leads to sales opportunities
4. Close  Bring your coffee
5. Cultivate  Retarget your clients
Funnel in Leads From Anywhere

- Zillow®
- Realtor.com®
- trulia®

Big Purple Dot

- Inbound Calls
- Realtors' Open Houses
Speed to Contact

Calls

Distribution

Emails

SMS

Texts
Call Distribution

1. Incoming Call
2. Call Blasted to Agents
3. Call Claimed by Agent

Voicemail if Not Answered

www.bigpurpledot.com

Voicemail left by client (nobody answered blast)
From: +19494265514
Blasted:
- Zach Realtor: 734 141 9349
- Carolyn Realtor: 138 405 9489

8/10/16, 6:50PM
Internet Lead Distribution

Incoming Lead

Round Robin

OR

Claim a Lead

www.bigpurpledot.com

You have 0:20:00 minutes to claim contact before it gets redistributed

Claim Lead
SMS

1. Incoming Lead
2. Wait 2 Minutes OR Wait 1 Day
3. Respond With SMS

Auto Respond

AND

Continued Communication

www.bigpurpledot.com
SMS and Email Drip Campaigns

Drip Campaigns

Campaign Name: New Lead
Campaign status: New
Matches source (optional):
Static "From" address (optional):

Tracking number: (None)
Email signature: Resolve from assignees
When assignees is (optional):
This assignee is the sender

Setup your drip system rules. You can choose either a "Wait", "Email", "Sms" or "Add a Status Tag" option. These actions will trigger in order.

Text messages longer than 160 characters will be split up and depending on the receiving phone may not display in the correct order.

Order | Action | With Text | Delete
--- | --- | --- | ---
1 | Send Sms | Thank you for reaching out! How can I help you today? | 53 | ✗
2 | Send Email | Using Template: | |

* Add Another Action

Save | Cancel
Lender Connect

An awesome new feature to connect lenders and realtors

Realtors can quickly share leads with lenders without signing up for an account.

Lenders can share documents with the Realtors in real time.

Lenders can share loan milestones and progress every step of the way remove “easily”
Capture New Loans From Encompass

1. App Created in Encompass
   User creates application in Encompass

2. BPD Gets Notified of New File
   Synced loan information is brought into BPD

3. Loan is Synced From Encompass
   Synced loan information is brought into BPD

4. Constant Updates
   BPD checks for changes every 5 minutes

5. Analytics
   Lead cost analysis and source conversion
## Synced Loans

<table>
<thead>
<tr>
<th>Primary Borrower</th>
<th>Program</th>
<th>APR</th>
<th>Interest</th>
<th>Amount</th>
<th>Milestone</th>
<th>Created</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>30 Year Conventional Fixed Rate Type: Purchase</td>
<td>5.292%</td>
<td>4.126%</td>
<td>$261,900</td>
<td>Started</td>
<td>01/18/2018</td>
<td>9 minutes ago</td>
</tr>
<tr>
<td>Joseph Davidson</td>
<td>30 Year Conventional Fixed Rate Type: Purchase</td>
<td>4.155%</td>
<td>4.0%</td>
<td>$195,000</td>
<td>Apprv'l w/Cond's</td>
<td>11/18/2017</td>
<td>9 minutes ago</td>
</tr>
<tr>
<td>Timothy Brin</td>
<td>20 Year Conventional Fixed Rate Type: Purchase</td>
<td>4.23%</td>
<td>4.126%</td>
<td>$320,000</td>
<td>Submittal</td>
<td>11/18/2017</td>
<td>9 minutes ago</td>
</tr>
<tr>
<td>Michele Harrison</td>
<td>30 Year Conventional Fixed Rate Type: Purchase</td>
<td>4.66%</td>
<td>4.5%</td>
<td>$184,000</td>
<td>Started</td>
<td>01/07/2018</td>
<td>9 minutes ago</td>
</tr>
<tr>
<td>Gregory Kaleb</td>
<td>30 Year Conventional Fixed Rate Type: Purchase</td>
<td>4.757%</td>
<td>4.35%</td>
<td>$418,000</td>
<td>Processing</td>
<td>01/10/2018</td>
<td>9 minutes ago</td>
</tr>
<tr>
<td>Nicholas Jackson</td>
<td>30 Year Conventional Fixed Rate Type: Purchase</td>
<td>4.556%</td>
<td>4.0%</td>
<td>$227,950</td>
<td>Apprv'l w/Cond's</td>
<td>12/03/2017</td>
<td>9 minutes ago</td>
</tr>
<tr>
<td>Elliot Masters</td>
<td>30 Year Conventional Fixed Rate Type: Purchase</td>
<td>0.0%</td>
<td>0.0%</td>
<td>$200,000</td>
<td>Started</td>
<td>12/27/2017</td>
<td>9 minutes ago</td>
</tr>
<tr>
<td>Carl Simmons</td>
<td>30 Year Conventional Fixed Rate Type: Purchase</td>
<td>0.0%</td>
<td>0.0%</td>
<td>$200,000</td>
<td>Started</td>
<td>10/27/2017</td>
<td>9 minutes ago</td>
</tr>
<tr>
<td>Indra Costello</td>
<td>30 Year Conventional Fixed Rate Type: Purchase</td>
<td>4.564%</td>
<td>4.35%</td>
<td>$250,110</td>
<td>Shipping</td>
<td>11/18/2017</td>
<td>9 minutes ago</td>
</tr>
<tr>
<td>Petyr Baselish</td>
<td>30 Year Conventional Fixed Rate Type: Purchase</td>
<td>4.186%</td>
<td>4.125%</td>
<td>$494,000</td>
<td>Disclosure</td>
<td>01/16/2018</td>
<td>9 minutes ago</td>
</tr>
<tr>
<td>Emily Madera</td>
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<td>4.566%</td>
<td>4.125%</td>
<td>$331,550</td>
<td>Shipping</td>
<td>11/18/2017</td>
<td>9 minutes ago</td>
</tr>
</tbody>
</table>
Optimal Blue Integration
Pricing Campaign Overview

A  Automated Pricing

1. Inbound Leads
2. Pull Pricing
3. Borrower Browses Pricing

B  Manual Price Discovery

1. LO Prospecting
2. Runs Pricing
3. Email Pricing
4. Track Borrower Actions
Reprice Programs with Optimal Blue
Loan Officer Emails Results To Borrower

Rates automatically included in subject line and for better open performance
Hey John,


Mori non magna ac massa consectetur consectetur. Phasellus sed hendrerit nibh. Quisque viverra fringilla elit, at congue augue. Duis vitae nisi viverra, tincidunt mauris bibendum, luctus diam.

Today’s Rates In Finance

<table>
<thead>
<tr>
<th>Loan Type</th>
<th>APR</th>
<th>View Rates</th>
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</thead>
<tbody>
<tr>
<td>30-Year Fixed Mortgage</td>
<td>4.18%</td>
<td></td>
</tr>
<tr>
<td>15-Year Fixed Mortgage</td>
<td>3.75%</td>
<td></td>
</tr>
<tr>
<td>30-Year Fixed Mortgage</td>
<td>4.00%</td>
<td></td>
</tr>
</tbody>
</table>
Borrower Uses Price Discovery Tool

Hey John, check out these great rates!
Borrower Email Notifications

Congratulations!
Track The Actions Of Your Contact
More Features

1. Open House App
2. Partner Collaboration
3. Lead Management
4. Call Dialer
5. CRM
6. And much, much more...
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